

**GENERAL FORM FOR REPORTING
ATTORNEYS' PLANNING MEETING**

Counsel Submitting and Utah State Bar Number
Attorneys for
Address
Telephone

**IN THE UNITED STATES DISTRICT COURT
FOR THE DISTRICT OF UTAH
_____ DIVISION**

vs.

*
*
*
*
*
*

Case No. _____

**ATTORNEYS' PLANNING
MEETING REPORT**

1. **ATTORNEYS' MEETING:** Pursuant to Fed. R.Civ.P. 26(f), a meeting was held on *specify date at specify location*.
 - a. The following were in attendance: *Separately list attorneys representing plaintiff(s) and defendant(s)*.
 - b. The parties have discussed the nature and basis of their claims and defenses.
2. **INITIAL DISCLOSURE:** The parties _____ have exchanged or _____ will exchange by _____ the information required by Rule 26(a)(1).
3. **DISCOVERY PLAN:** The parties jointly propose to the court the following discovery plan: *Use separate paragraphs or subparagraphs as necessary if the parties disagree*.
 - a. Discovery is necessary on the following subjects: *Briefly describe the subject areas in which discovery will be needed*.
 - b. All discovery will be completed no late than _____.
Specify whether discovery will (i) be conducted in phases, or (ii) be limited to or focused upon particular issues. If (ii), specify those issues and whether discovery will be accelerated with regard to any of them and the date(s) on which such early discovery will be completed.

- c. The following discovery methods will be used:

_____ Interrogatories

_____ Requests for Admission

For both of the above, specify the maximum number that will be served on any party by any other party and the number of days, following service, when responses are due.

_____ Oral Exam Depositions

_____ Written Questions Depositions

For both of the above, (i) specify the maximum number for the plaintiff(s) and the defendant(s), and (ii) indicate the maximum number of hours unless extended by agreement of the parties.

_____ Other discovery methods *Specify what other methods will be used and the limitations to which all parties agree on their use.*

- d. Reports from retained experts under Rule 26(a)(2) will be submitted on: *specify dates*
_____ by plaintiff(s) _____ by defendant(s)
- e. Supplementations under Fed.R.Civ.P 26(e) are due: *specify time(s) or intervals(s)*

4. OTHER ITEMS: *Use separate paragraphs/subparagraphs as necessary if the parties disagree.*

- a. The parties _____ request / _____ do not request a conference with the court prior to entry of the scheduling order.
- b. The parties request a final pretrial conference in: *specify month and year*

- c. The cutoff dates for joining additional parties are: *specify date*
Plaintiff(s) _____ Defendant(s) _____
- d. The cutoff dates for amending pleadings are *specify date (NOTE: Establishing cutoff dates for amending pleadings does not relieve counsel from the obligation to meet the requirements of Fed.R.Civ.P. 15(a))*
Plaintiff(s) _____ Defendants(s) _____
- e. The cutoff date for filing dispositive or potentially dispositive motions is

- f. The potential for settlement is: _____ likely _____ unlikely
_____ cannot be evaluated prior to: *specify date* _____

- g. The potential for resolution of this matter through the court's alternative dispute resolution program is
Via arbitration: _____ likely _____ unlikely
_____ cannot be evaluated prior to: *specify date* _____
Via mediation:: _____ likely _____ unlikely
_____ cannot be evaluated prior to: *specify date* _____
- h. Final lists of witnesses and exhibits pursuant to Fed.R.Civ.P 26(a)(3) are due by: *specify dates*
_____ from plaintiff(s) _____ from defendant(s)
- i. The parties should have _____ days after service of final lists of witnesses and exhibits to list objections under Rule 26(a)(3).
- j. This case should be ready for trial by: *specify date* _____
- k. The estimated length of the trial is: *specify time* _____

Date: _____

Signature and typed name of Plaintiff(s) Attorney

Signature and typed name of Defendant(s) Attorney

NOTICE TO COUNSEL

THE COMPLETED REPORT OF THE ATTORNEY PLANNING MEETING MUST BE COMPLETED AND FILED WITH THE CLERK OF COURT WITHIN TEN DAYS OF THE DATE OF THE PLANNING MEETING. COUNSEL SHOULD BRING A COPY TO THE INITIAL PLANNING CONFERENCE.